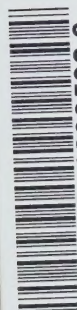


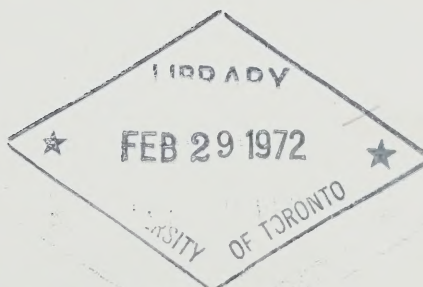
CA20N
FD 21
-70P54C

Government
Publications

Poland



3 1761 11893592 3



FOREIGN MARKET DEVELOPMENT SECTION

RESEARCH BRANCH

TRADE AND INDUSTRY DIVISION

ONTARIO DEPARTMENT OF TRADE AND DEVELOPMENT

Foreign market study.

CAZØN
ED21
-70P54C

FMS-72-4

FOREIGN MARKET STUDY

POLAND


J.M.T.
January, 1972

Prepared by:

Foreign Market Development Section
Research Branch
Trade and Industry Division
900 Bay Street
Toronto, Ontario

F O R E W O R D

Export marketing research is a subject of considerable interest to our Department, to Ontario manufacturers and to businessmen who may be interested in exports. The Foreign Market Studies which are undertaken by our Section, are written for the use of our Trade and Industry Division, and specifically by our Marketing Branch and Trade Mission members. These studies depict the economic background of the countries that will be visited. For this reason our Foreign Market Studies are, in the first instance, working documents designed for the use of the Department and cannot be taken in their entirety as expressing the opinion or position of the Department of Trade and Development.



Digitized by the Internet Archive
in 2024 with funding from
University of Toronto

<https://archive.org/details/31761118935923>

Equivalents of metric, Imperial and U.S. units of measure

Metric Units		Imperial and U.S. Equivalents	Imperial and U.S. Units	Metric Equivalents
<u>Length -</u>				
1 centimetre (cm)	.....	0.394 inch	1 inch.....	2.540 cm
1 metre (m)	.....	{ 3.281 feet	1 foot.....	30.480 cm
	.....	{ 1.094 yard	1 yard.....	0.914 m
1 kilometre (km)	.....	{ 0.621 mile	1 mile.....	1609.344 m
	.....	{ 0.539 int. naut. mile	1 International nautical mile.....	1852.000 m
<u>Area -</u>				
1 square centimetre - cm ²	.....	0.155 square inch	1 square inch.....	6.451 cm ²
1 square metre - m ²	.....	{ 10.764 square feet	1 square foot.....	9.290 dm ²
	.....	{ 1.196 square yard	1 square yard.....	0.836 m ²
1 hectare - ha	.....	2.471 acres	1 acre.....	0.405 ha
1 square kilometre - km ²	.....	0.386 square mile	1 square mile.....	2.589 km ²
<u>Volume -</u>				
1 cubic centimetre - cm ³	.....	0.061 cubic inch	1 cubic inch.....	16.387 cm ³
1 cubic metre - m ³	.....	{ 35.315 cubic feet	1 cubic foot.....	28.317 dm ³
	.....	{ 1.308 cubic yard	1 cubic yard.....	0.765 m ³
<u>Capacity -</u>				
1 litre (L)	.....	{ 0.879 Imp. quart	1 Imperial British quart.....	1.136 L
	.....	{ 1.057 U.S. liq. quart	1 U.S. liquid quart.....	0.946 L
	.....	{ 0.908 U.S. dry quart	1 U.S. dry quart.....	1.101 L
	.....	{ 21.997 Imp. gallons	1 Imperial gallon.....	4.546 L
	.....	{ 26.417 U.S. gallons	1 U.S. gallon.....	3.785 L
1 hectolitre (HL)	.....	{ 2.749 Imp. bushels	1 Imperial bushel.....	36.369 L
	.....	{ 2.838 U.S. bushels	1 U.S. bushel.....	35.239 L
<u>Weight or Mass -</u>				
1 kilogramme (kg)	.....	{ 35.274 av. ounces	1 av. ounce.....	28.349 g
	.....	{ 32.151 troy ounces	1 troy ounce.....	31.103 g
	.....	{ 2.205 av. pounds	1 av. pound.....	453.592 g
	.....		1 centerweight (100 lb.).....	45.359 kg
	.....		1 hundredweight (112 lb.).....	50.802 kg
1 ton -	.....	{ 1.102 short tons	1 short ton.....	0.907 t
	.....	{ 0.984 long tons	1 long ton.....	1.016 t

TABLE OF CONTENTS

	<u>Page No.</u>
MAP OF POLAND	i
MARKET INDICATORS	ii
INTRODUCTION	1
GENERAL INFORMATION	3
Geography and Climate	3
Human Resources	3
Constitution	4
STRUCTURE OF THE ECONOMY	6
Agriculture, Forestry, Fishing	7
Mining	9
Industry	10
Electricity	17
Transportation	18
FOREIGN TRADE	19
Structure of Foreign Trade	19
Description of Poland's Imports	20
Description of Poland's Exports	21
CANADIAN TRADE WITH POLAND	23
General	23
Canadian Exports to Poland	23
Ontario Exports to Poland	23
Canadian Imports from Poland	24
Opportunities for Canadian Manufacturers	24
POLAND'S ECONOMIC AND TRADE POLICY	24
Polish Foreign Trade Policy	24
Polish Economic Planning Policy	25

TABLE OF CONTENTS
Statistical Data

	<u>Page No.</u>
Table I Ontario Domestic Exports to Poland by Commodities 1969 - 1970	26
Table II Canadian Exports to Poland by Commodities 1969 - 1970	27
Table III Canadian Imports from Poland by Commodities 1969 - 1970	28

P O L A N D

MARKET INDICATORS

	<u>Poland</u>	<u>Canada</u>
Population (1970)	32.8 million	21.4 million
G.N.P. (1970) est.	\$31 billion	84.5 billion
Telephones in use (1969)	1,756	9.3 million
Television sets in use (1969)	2,934	5.4 million-households with T.V. sets
Passenger cars in use (1969)	423,011	6.4 million
Steel production (1970)	11.8 million metric tons	11.2 million metric tons
Cement production (1970)	12.1 million metric tons	7.2 million metric tons
Electricity production(1970)	64.5 billion kwh	203.7 billion kwh
Motor car production (1970)	67,800	940,000
Exports (1970)	\$3.6 billion	\$16.4 billion
Imports (1970)	\$3.8 billion	\$13.9 billion

INTRODUCTION

Prior to World War II, Poland was predominately an agricultural country, although a trend to industrialization was developing. During the Second World War the Polish economy suffered great destruction in its industry and agriculture. During the post-war period, Poland's economy has developed through 5 year economic plans which have stressed industrialization, especially of heavy industry. Poland is now among the most industrialized areas in Eastern Europe and is an important producer of industrial goods in this area. This industrialization process was aided to some extent by the takeover of a small but relatively well industrialized area from Germany after the war.

Poland is currently undergoing economic changes under the leadership of Mr. Gierek who replaced Mr. Gomulka in December 1970. The present government is reconsidering its basic economic priorities and the new economic strategy aims to concentrate investment and other productive resources in particular industrial sectors. Emphasis is now being placed on the expansion or creation of scientific and technological industries such as chemicals, electronics and automation equipment industries. These, along with the traditional shipbuilding, automobile and machine tools industries will receive investment priority.

In addition to attaching importance to continuing industrialization, the new government is concentrating on a number of changes in the country's broad social programme. New emphasis is being placed on higher wages, more housing, greater production of light industry goods, improved retail services and similar consumer-oriented features. Shortage of food and accommodation and poor quality consumer goods are acknowledged problems in Poland, which the present government is attempting to correct through agricultural incentives, greater investment in the construction industry and major reorganization of the consumer goods industry.

Measures introduced during 1971 in an attempt to improve living conditions included a price freeze on food, raising workers wages, upgrading pensions, granting of new credit for housing development and greater supply of consumer products. Imports of consumer goods for the first half of 1971 were 28% higher than for the same period in 1970.

Economic change is expected to continue and the 1971-1975 Five Year Plan, substantially revised during 1971, primarily aims at raising living standards and increasing consumer goods production.

In January 1971, a limited reorganization in Poland's trade system was introduced, making it easier for an exporter to reach the end-user.

Poland's foreign trade in 1970 amounted to slightly over \$7 billion. As a member of COMECON* Poland's trade with other member countries constitutes

* Poland, U.S.S.R., East Germany, Czechoslovakia, Hungary, Rumania, Bulgaria, and Outer Mongolia.

the major portion of her foreign trade. In 1970 this amounted to 63% with the U.S.S.R. accounting for 36%. Poland's chief exports are raw and processed materials, machinery and plant and foodstuffs. Poland is also a major exporter of coal and ships.

Canada's share of Poland's foreign trade is very small amounting to less than 1%. In 1970 Canada exported \$15 million worth of goods to Poland and imported goods valued at \$12 million. With persistence and patience Canadian exporters should be able to diversify their exports to this country and obtain a larger share of Poland's growing import market.

Poland's import policies during the next few years are expected to emphasis imports of raw materials for particular industrial branches, consumer goods essential for raising the standard of living not yet manufactured domestically, imports of cereals and fodder, as well as selective imports of technical know-how and scientific apparatus.

Poland is also interested in developing co-production ties with other countries, including those of the West.

Geography and Climate

Poland is in the geographical centre of Europe. The area of Poland is about 120,000 square miles. Border changes after the Second World War reduced Poland's area by about 20%. Poland ceded a large but poorly industrialized and low yield agricultural area in the east to Russia, and took over a smaller but relatively well-industrialized and higher yield agricultural area from Germany. In the west Poland borders with the German Democratic Republic, in the east with the U.S.S.R. and in the south with Czechoslovakia. Poland has for the most part natural frontiers. The northern boundary is the Baltic coastline.

Poland may be divided into three economic regions:

1. Region of Diversified Economy which occupies most of southern Poland and contains the most productive agricultural land, a large proportion of the minerals and the major industrial districts.
2. Lowland agricultural Region which is dominated by extensive agricultural activity.
3. Upland Agricultural Region which is a rugged sparsely populated area of the Carpathian Mountains in southeastern Poland.

The mountain ranges in Poland are the Carpathian and Sudeten in the south and southwest and the Swietokrzyskie Mountains in the Central Poland region. Practically all Polish rivers flow into the Baltic sea. The main rivers are the Vistula and the Oder.

Poland is subject to considerable meteorological variations. Poland is characterized by severe winters, warm springs, warm and rainy summers and cool and rainy falls. Temperatures vary from an average of less than 30 degrees fahrenheit in January to 65 Degrees fahrenheit in summer. Annual average rainfall for the most of the country is about 25 inches, although it reaches 45 inches in the mountain fringes.

2. Human Resources

The population in Poland in 1970 was 32.8 million people. The United Nations estimates it will reach 38.4 million by 1980. The natural growth rate of the Polish population, although decreasing in recent years, is still among the highest in Eastern Europe.

Approximately 52% of the population is urban. Poland has ten cities with a population of over 200,000. The capital and by far the largest city is Warsaw with a population of approximately 1.3 million people. Lodz (753,000), the second largest city is a major textile centre and has the nickname of "The Polish Manchester". Other cities of substantial size are Krakow (576,000) and Wroclaw (517,000). Poland has several ports covering local trade, while Gdynia, Gdansk, Szczecin and Kolobrzeg are of international importance.

Prior to the war two-thirds of Poland's labor force was engaged in agriculture. In 1970 this had dropped to about 36% partly as a result of the territorial changes whereby Poland gave up agricultural regions to the U.S.S.R. and gained more industrialized western territories, and also as a result of the government's heavy promotion of industry in the post war period.

Poland's economically active population in 1970 was approximately 16.4 million people of which about 5.9 million were engaged in agriculture. With the exception of agriculture which is to a large extent still in private hands, the labor force is employed nearly 100% in the state economy.

The following table shows employment in the Polish economy by sectors for 1970, excluding private agricultural holdings.

EMPLOYMENT IN STATE ECONOMY BY SECTORS			
	000's		
	1950	1970	1970 %
Agriculture	352	575	5.7
Forestry	92	176	1.7
Non-agricultural sector	4,622	9,336	92.6
industry	2,099	4,263	42.3
construction	510	1,075	10.7
transport and communications	460	937	9.3
trade (distributive)	535	907	9.0
housing and community services	108	399	4.0
other	910	1,755	17.3
	5,066	10,087	100.0

Source: Statistical Yearbook of Poland 1971.

During the past five years Poland has needed to provide 1.5 million new jobs. The number of new jobs needed over the next five years to accommodate the school-leavers entering the labour market by 1975 is estimated at 1.8 million. The number of women in the labor force is increasing and in 1970 reached 39% compared to 33% in 1960.

Attention has been concentrated on educational development to meet the growing need for skilled labor. Poland has a number of facilities for adult education as well as eight universities, 15 institutes of technology, and 10 medical schools.

3. Constitution

The Government structure of the Polish Peoples Republic is delineated in the Polish constitution which was adopted in 1952.

The 1952 constitution vested power in the Sejm, composed of 460 deputies, elected every four years by all citizens over 18 years of age.

The Sejm chooses from its members a Council of State and a Council of Ministers. In fact, however, the supreme power lies with the Politburo of the United Workers Party and its First Secretary. The party chief is at present Mr. Edward Gierek.

STRUCTURE OF ECONOMY

Poland's economy has developed from being predominately agricultural to industrial since the last war.

Industry now accounts for approximately 57% of the national income compared to 37% in 1950 and employs 42.3% of the actively employed population. Industry is state owned with the exception of about 108,000 privately-owned handicraft workshops employing about 205,000 persons. The handicraft sector accounts for less than 1% of the national income. Major industries in Poland include iron and steel, coal, shipbuilding, machine tools, automobiles, textiles and food products

The following table shows the substantial growth of Poland's industry during the past years.

	<u>Industrial Production in Poland</u> 1963 = 100						
	<u>1964</u>	<u>1965</u>	<u>1966</u>	<u>1967</u>	<u>1968</u>	<u>1969</u>	<u>1970</u>
GENERAL	109	119	128	138	151	163	178
MINING	105	108	113	117	125	134	130
MANUFACTURING	110	120	129	139	152	165	180
ELECTRICITY	110	122	132	143	160	179	190

Source: United Nations Monthly Bulletin

Agriculture, however, remains an important part of the economy employing over one-third of the labor force and contributing approximately 16% of the national income. Contrary to the majority of other Socialist countries, only a small portion of agricultural activity is collective and over 80% of Poland's agricultural production comes from privately owned farms. Agriculture remains an important source of foreign currency for Poland.

In addition to owning all means of production, the State controls all mineral resources, transportation, banks, and public services.

Poland is one of the world's richest countries in copper and sulphur deposits. She is also a major producer and exporter of hard coal.

Poland's national income in 1970 increased 6% compared to 3% in 1969 and an annual average of 7.1% in 1966-1968. National income grew at a slightly lower pace during the period 1966-1970, than 1961-1965, due to a considerable decline in agricultural output during the years 1969 and 1970. In 1970 the produced national income is estimated to be approximately \$31 billion. According to the revised five year plan Poland's national income is expected to increase about 38-39% over the next five years. The socialized sector of the economy accounts for 80% of the national income.

AGRICULTURE, FORESTRY, FISHING

Despite Poland's post-war emphasis on development in industry, agriculture still remains an important sector of the Polish economy, employing over one-third of the labor force and contributing approximately 16% of the G.N.P.

In contrast to other East European countries, Polish agriculture is largely in private hands. Various attempts at collectivization by the Government have proved unsuccessful and the major proportion of land remains cultivated by small farmers who own approximately 3.6 million farms. The Socialist Sector owns about 13% of arable land and supplies approximately 18% of total agricultural production.

The area of agricultural land in Poland diminishes year by year. In 1971 the land under crops was approximately 37 million acres, .2% less than in 1970.

The western parts of Poland are much more productive agriculturally than the eastern parts. Climate and soil conditions combine to give Poland a mixed type of farming. The main crops are grains (rye, oats, wheat and barley), potatoes, sugar beets and fodder crops. Potatoes is one of the leading crops of Poland. Hops and tobacco are grown in the central and southern parts of the country. Fruit crops are of increasing importance. Under the agricultural specialization encouraged by COMECON Poland will continue to concentrate on the production of rye, oats and potatoes.

The following tables show production of Poland's main crops and the livestock population. In 1970 production of wheat, rye, barley and oats was 4.6 million tons, 5.5 million tons, 2.1 million tons and 3.2 million tons respectively.

	<u>Production of Selected Crops</u>		
	million tons		
	1965	1969	1970
4 cereals (Wheat, rye, barley, oats)	15.5	17.9	15.4
Fodder for grain	0.4	0.3	0.3
Potatoes	42.7	44.9	50.2
Sugar Beets	12.3	11.3	12.7
Rapeseed and agrimony	0.5	0.2	0.6
Tobacco	0.05	0.09	0.09
Fodder-root	6.6	7.2	7.9
Hay - trefoil	4.0	3.7	4.5
Meadow	10.4	10.9	13.7

Source: Statistical Yearbook of Poland 1971.

Livestock Population 1970

Cattle	10,843
Pigs	13,446
Sheep	3,199
Cows	2,585

The government in the past few years has been making a strong effort to step up agricultural development, and considerable investment has been made in machinery and fertilizers. Investment was more than double in 1970 than in 1960. Nevertheless, a severe food shortage developed in Poland during 1969 and 1970 due to poor harvests and the policy of exporting foodstuffs rather than using them to meet domestic requirements.

The present government remains concerned about this sector. Recent decisions taken regarding the development of agriculture 1971-1975, include intensification of co-operation between industry and farming, the lifting in 1972 of compulsory quota deliveries of agricultural produce, land tax reform, improved credit policies, improvement in investment policies, agricultural services and agricultural education.

The proportion of urban population to rural is growing and demand for a greater diversity of food has developed. The main task of agriculture at the moment is the speeding up of production to cope with the increased demand for foodstuffs, particularly of meat and milk. The lifting of compulsory deliveries of grain, potatoes and livestock should encourage the production of livestock.

Investments are to be made in agricultural machines and equipment, land improvement and modernization of water supplies as well as for technological auxiliaries. The present government's agricultural programme treats agriculture and the food processing industry as one and investment is also to be made for preliminary processing of linen, hemp and fruit and for building tobacco driers.

Agriculture products remain an important source of foreign currency for Poland. In 1970, exports of agricultural products and foodstuffs accounted for 13.2% of total exports. 29% of total exports to non-socialist countries were agricultural.

Forestry

Both forest and wood using industries are under state control. Forests make up about a quarter of Polish territory with coniferous timber occupying about 83% of the forest area. Forest products figure significantly in exports. Poland exports timber principally to Great Britain, West Germany, Hungary, Austria and France.

Poland has an aggressive afforestation programme. During the period 1961-1975, 1,462,000 acres will be afforested.

Fishing

Despite considerable expansion through government efforts, fisheries play a minor role in the Polish economy. The fishing fleet in 1970 included 147 deep-sea fishing vessels and 545 cutters. The total catch in 1970 amounted to 449,000 tons compared to 386,000 tons in 1969 and 280,000 in 1965.

Mining

Poland has a variety of natural resources, most of which are located in the southern part of the country. Coal, salt, sulphur and certain building materials are found in sufficient quantities for domestic requirements as well as for export. Poland is one of the world's richest countries in copper. Deposits of iron and non-ferrous metal ores, crude oil and phosphates are comparatively poor.

Mining employs approximately 459,000 workers of which about 82% is involved in coal mining.

Hard coal is the most important of Poland's resources and an important export item. Reserves are estimated at over 70 billion tons. Hard coal is concentrated chiefly in the Upper Silesian Basin while a smaller amount of superior quality is found in the Lower Silesian Basin. Recently exploitation was started in the Rybnicki Basin. Brown coal is also important to Poland as a good source for the power industry. Possible reserves are estimated at as high as 40 billion tons.

The steady growth of the coal industry is due to consistent implementation of investment plans, automation, mechanization and concentration of production. Approximately 83% of coal extraction was mechanized in 1970.

Poland's exports of hard coal in 1970 amounted to 28.8 million tons, thus maintaining her position as the second largest coal exporter in the world. The U.S.S.R. was the main customer followed by Denmark, Italy, Czechoslovakia and East Germany.

Crude oil is found in south-eastern Poland at the foot of the Carpathian Mountains. Production meets only about 5% of domestic requirements and in 1970 Poland imported 7 million tons of petroleum, primarily from the U.S.S.R., by way of pipeline. Poland's oil consumption is expected to increase at 17% annually during the next ten years. Development possibilities are limited and future demand is expected to be met by imports.

Poland has rich natural gas deposits and production is sufficient to meet domestic needs. Production is increasing annually and in 1970 amounted to 5.1 billion cubic metres compared to 3.9 billion cubic metres in 1969.

Iron ore is found in Gory, Swietokrzyski, Czestochowa and Leczyca but production is about 3 million tons a year, insufficient to meet domestic

needs. In 1970 Poland imported 11.8 million tons mostly from the U.S.S.R., although Poland also imports ores from western countries.

Poland has large zinc and lead ore reserves in the Krakow-Silesian regions, but must still import zinc concentrates to be processed, as well as lead. In 1970 Poland imported 124 thousand tons of zinc concentrates.

Rich copper reserves, among the largest in the world, were discovered near Boleslawiec in Lower Silesia a few years ago and are now being developed. Reserves are estimated at at least 10 million tons.

Poland is among the world's major producers of sulphur and high priority has been given to developing this industry. Deposits at Tarnobrzeg and Grzybow are estimated at 100 million tons. Production is approximately 3 million tons annually, used primarily for the domestic chemical industry, although some is exported.

Poland also has large reserves of rock salt near Krakow. Annual output is around 2.8 million tons.

Poland is well endowed with raw materials for the building industry, and major cement and lime industries have developed. Cement production in 1970 amounted to 12.1 million metric tons. Various materials are quarried for Poland's glass and ceramic industries.

Poland also has certain amounts of nickel, chrome and cobalt in Lower Silesia.

The following table shows production of the mining industry for the past three years.

Poland's Mineral Production 1968-1970
'000 metric tons

	<u>1968</u>	<u>1969</u>	<u>1970</u>
Coal	128,600	135,000	140,100
Lignite	26,900	30,900	32,800
Iron-ore	3,050	2,821	2,553
Petroleum	475	438	424
Natural gas (million cubic metres)	2,568	3,924	5,184
Lead	60	65	67
Zinc	218	229	241

Source: United Nations Bulletin

Industry

During the past two decades Poland has become an increasingly industrial country. Industry now accounts for approximately 57% of the national income,

compared to 37% in 1950. Following World War II, Poland's government invested substantially in the development of heavy industry to the detriment of other traditional industrial sectors. The engineering, transportation, metallurgy and chemical industries developed at a much more rapid rate than the light industries and food industry.

Polish industry is state controlled with a small privately owned handicraft sector having a very insignificant share. Prior to the Second World War the State owned 70% of the country's iron production, 30% of coal production and a third of the chemical industry. The Decree of Nationalization of 1946 legalized a process already begun and all industrial enterprises of more than 50 people were nationalized at that time. The act granted the Council of Ministers power to nationalize enterprises if deemed necessary. Further socialization over the next four years resulted in 97.7% of industrial employment being socialized by 1950.

The socialized sector of Poland's industry accounted for 99% of gross industrial production in 1970, of which state-owned enterprises accounted for 90% and co-operative 9%.

Industry accounts for 42% of the total actively employed population of which 98.8% is engaged in socialized industry. State-owned industry accounts for 86.3% and co-operatives 12.5%. The food and textile industries employ the largest proportion of industrial workers. These together with the machinery and electrical engineering industries account for 37% of socialized industrial employment.

Industrial Employment by Sector 1970
%

Food	11.2
Textiles	10.6
Transportation equipment	8.6
Electrical engineering	5.6
Machinery and structural metal products	9.7
Fabricated metal products	7.1
Chemicals and products	5.6
Fuel industry	9.9
Building materials	5.0

Source: Statistical Yearbook of Poland 1971

Industrial production in 1970 showed an 8.3% gain with capital goods production increasing by 9% and consumer goods by 7%. Industrial production was forecast to rise 6.8% in 1971. During the first nine months production increased 7.2% over the corresponding period in 1970. Marked growth has occurred in agricultural and the food industries as a result of the emphasis currently being placed on these sectors.

Industrial production is expected to increase by 48%-50% during the years 1971-1975 with emphasis being placed on the motor, electrical engineering and electronics industries. With its raw materials such as coal, natural

gas, and sulphur, Poland also plans to concentrate on further developing the petrochemical industry.

Most important to the Polish people themselves is the recent revision of the current Five Year Plan to emphasize the production of consumer goods for domestic use. The targets originally set for this sector have been considerably increased.

The Steel Industry

Poland has given priority in its economic plannings to the development of the steel industry. The steel works at Nova Huta, is one of the largest integrated iron and steel works in Europe. During the past five years the industry has introduced many interesting technological innovations.

The Polish steel industry is dependent upon imports of iron ore. In 1970 Poland imported 11.8 million tons of iron ore, a major portion of which came from the U.S.S.R.

Poland's steel production is expected to increase to 14.7 million tons in 1975. Production in 1970 increased 4% over 1969.

Poland's production in ferrous metallurgy was as follows in 1950 - 1970:

	<u>Million Tons</u>		
	<u>1950</u>	<u>1960</u>	<u>1970</u>
Pig iron	1.5	4.5	7.3
Crude steel	2.5	6.6	11.8
Rolled products	1.7	4.4	8.1
Steel pipes	.1	.3	.7

Source: Polish Economic Review.

With the growth in production, exports have also increased. The U.S.S.R., Rumania, and the U.S. are major purchasers.

The Non-ferrous Metallurgy Industry

Poland is developing its non-ferrous metallurgy industry with increased development of its raw material base. A new zinc ore mine, Pomorzamy, is to be completed in 1972 and a new copper mill is proposed for Glogow.

More extensive processing of copper and its alloys will be possible through major expansions and modernization of a number of plants and construction of new mills. By 1972 the output of copper pipes, bars and wires is expected to be twice as high.

Modernization is also planned for the aluminum industry and production is to be increased.

The Machine Industry

The development of the machine industry has given priority to the production of machine tools, motor cars, construction and road building machinery, agricultural tractors and equipment and implements internal combustion engines, electrical machines and apparatus, control and measuring instrument equipment, electronics and textile machinery.

Machine Tool Industry

During the post-war period the machine tool industry developed more rapidly than other branches of the machine and metallurgical industries. Poland is now among the top ten producers of machine tools in the world. Approximately 400 types of machines were produced during this period and production has also started on more than 900 assorted tools and instruments. The industry is following the trend of concentrating on numerically controlled machine tools. A fundamental change is presently occurring on the structure of the machine tool industry aimed at increasing the proportion of high-production special machine tools and automated and precision machine tools with up-to-date control systems such as numerical control and pneumatic and electro-mechanical controls.

Construction and Road-Building Machinery

Poland is an important producer and exporter of construction and road-building machinery. Production has increased approximately 20% annually in recent years. Poland exports a large amount of this type of machinery covering a range of over 300 items, such as excavators, cranes, concrete mixers, road rollers and trucks. Poland is concentrating on the possibility of multi-lateral development of production of construction machinery in the following basic groups:

1. earth-moving and road-building machines
2. vertical transport and handling machines

Motor Vehicle Industry

Recent years have seen major growth in the development of Poland's motor vehicle industry which now accounts for approximately 25% of all production and 18% of exports of the machine industry. Production of the industry increased 20% in 1970 over 1969.

In spite of the increasing number of cars being produced each year, present production does not meet current requirements. Considerable reorganization is being undertaken in the car industry and production is expected to increase substantially during the next five years. Production will be discontinued of the "Warszawa" and production of a small car with a 600-900 cu. mn. engine started under foreign licence. Production is expected to be intensified of the Polish Fiat 125P to 110,000 per year until 1975. Poland's car production in 1971 is estimated at 90,000 compared to some 67,000 in 1970 and 4,000 in 1955.

Production of medium and heavy lorries are an important branch of the motor industry. They are produced by two factories, Fabryka Samochodow Ciezarowych and Jelczanskie Zaklady Samochodowe.

Production of lorries in 1970 amounted to 40,000 compared to 10,500 in 1950. Production of lorries is expected to increase and new types are being developed. The production of buses is also planned to be increased.

Along with the development of the motor industry the production of spare parts is also expected to expand.

Textile Machinery Industry

The Polish textile machinery industry has been established for over a century. Production covers almost 200 basic types of machines and equipment for the textile industry and processing of synthetic fibres. Nearly 50% of production is exported. Exports in 1970 increased by 22% quantitatively and included the exports of complete plants as well as machines. The industry is well known for its carding machines for wool and cotton processing, automatic looms for cotton and silk, and dyeing machines.

Agricultural Machinery Equipment

Polish industry presently manufactures over 400 types of agricultural implements and tools. During the years 1971-1975 it is expected there will be concentration on further development of up-to-date harvesting equipment such as field cutters, grab loaders, potato diggers and grain harvesters. The production of tractors is also an important part of Poland's production of agricultural equipment. Tractor production is to reach 61,000 in 1975 and a new standardized tractor series will be introduced into production.

Electric Machinery Industry

Poland manufactures many types of electric machines and apparatus, a considerable portion to specification for foreign markets. Poland produces rotating machines, transformers, switchgear and low-voltage apparatus as well as a whole range of turbo-alternators and synchronous generators for the power industry.

In 1970 development of this industry continued with an increase of 14% in production over 1969. Exports also increased with a growth of 60% of exports to the non-Socialist countries. Many countries are constructing power and industrial plants for which Polish industry supplies the complete electrical equipment.

Mining Equipment Industry

Poland produces a wide range of mining equipment including mining transformer sets for pumps and drills as well as electric motors for driving coal cutters, loaders and combines. Poland ranks second in production of mining equipment in Europe after the U.S.S.R.

Chemical Equipment Industry

With the continued expansion of Poland's chemical industry, the chemical equipment industry is also expected to expand. While Poland imports chemical machines and equipment, she also exports such items as equipment for rubber and plastic processing, and complete factories for sulphuric acid, borax and dyes. Exports of chemical equipment are expected to increase 2.5 times during the next five years.

The Chemical Industry

Poland has sufficient domestic supplies of raw materials, with the exception of oil, for a well developed chemical industry.

Due to intensive investment, the Polish chemical industry now plays a major part in the national economy and continued emphasis is being placed on expanding this industry.

The chemical industry is Poland's third largest industry and accounts for about 10% of Poland's industrial output. In 1970 chemical production increased 11.9% over 1969. It is a well developed and constantly expanding industry. New plants have been built in Tarnow, Pulawy, Wloclawek and other localities. In recent years the industry has increased its output of traditional chemical products and added hundreds of new items, including man-made fibres, plastics and synthetic rubber. In 1971 the industry expected to add about 460 new products. Poland's pharmaceutical industry's output has increased over 80 times since 1945. It produces some 850 pharmaceuticals and 230 pharmaceutical substances. Rapid development is occurring in the dyestuff and fertilizers industries. Poland is also developing a petro-chemical industry based on imports from the U.S.S.R. and a large scale petrochemical plant recently completed in Plock is expected to process some 12 million tons of crude oil a year.

About 3% of Polish chemical output is exported accounting for approximately 4% of total exports.

Shipbuilding Industry

Poland's shipbuilding industry has expanded at a greater rate than many other branches of Polish industry and today Poland is among the major shipbuilders of the world. Originally nearly all production was for export but this has dropped to around 75%. In 1950 the U.S.S.R. was the only purchaser. While Russia remains the principal customer at the present time, Poland also now exports ships to 20 other countries including Brazil, Norway, and France. Orders placed for delivery during the 1971-1975 period guarantee a continuing growth in production of Polish shipyards.

Poland has four shipyards which altogether produce about 50 vessels annually representing half a million tons d.w.. Polish shipbuilding has consisted primarily of general cargo ships, universal tramps and fishing vessels rather

than tankers and bulk cargo ships as in other shipyards.

Poland presently ranks first place in production of fishing vessels such as mother ships, factory trawlers and freezer trawlers. Poland plays a substantial role in initiating new types of vessels and recently has started production of new types of hydrographic, oceanographic and other special purpose boats.

The development of the shipbuilding industry has been accompanied by the development of associated industries involving about 1,000 enterprises. Expansion of these industries is expected along with that of shipbuilding. Much of this production is exported also.

The Food Processing Industry

The food processing industry has been a traditional industry of Poland particularly the sugar, tobacco and brewing industries. Exports of this industry have been an important earner of hard currency. However, recently exports have cut down on domestic supplies and this accompanied by poor harvests in 1969 and 1970 resulted in a shortage of food for the home market, especially of meats and dairy products. The present government's goals of increased agricultural production include 24% growth in production of the food industry processing over the next five years.

Among the problems the industry faces are inappropriate storage facilities and the geographic situation of the countries processing establishments which cause wastage of valuable foodstuffs. Poland's processing establishments are situated chiefly in the western territories, while those in the agrarian eastern region are underdeveloped. Efforts are presently being made to improve the organizational network and to increase warehouse and refrigeration facilities. Construction of slaughter and meat processing facilities are planned in the agricultural regions of Lublin, Warsaw, Bialystok and Koszalin.

The proportion of urban population to rural is increasing and with it the demand for a higher standard of foodstuffs is growing.

A steady expansion of the variety of foodstuffs has been noted in the past few years and this growth is expected to continue. Among the new products are new kinds of fruit juices in powder form, frozen food products, baby food and cheeses. The range of products is being constantly adapted for changing tastes and requirements.

Particular attention is being paid to the packaging of food products, with plastics being used to an ever greater degree.

Exports of this industry are expected to continue to be of importance to Poland's economy. In 1970 exports of foodstuffs amounted to 9.4% of total exports with meat and meat products accounting for 4.5%. In addition to established exports of bacon, ham, canned meat, canned vegetables, and sugar, the industry aims at developing a much wider range of export products. The countries of Western Europe and the United States are the primary purchasers of Polish food products.

Building Materials Industry

With ready available natural resources, Poland has always had a strong building materials industry. The industry underwent further modernization and expansion after World War II. Poland is a major cement producer and in 1971 cement production was 12.1 million metric tons compared to 2.5 million metric tons in 1950. Other building materials produced in Poland in quantity are bricks, glass and gypsum and lime. A substantial amount of these products is exported.

The present government's program of housing construction for 1971-1975, increased from the original plan, envisages a 25% growth of accommodation over the previous five years. To cope with this construction, the output of the building materials industry will be substantially increased, particularly cement and wall materials such as concrete, silicates, structural ceramics and prefabricated board elements. Several plants for producing complete structural elements are to be constructed. In addition two new lime plants are to be put into operation and five new cement works. Poland has sufficient resources to supply the requirements of this industry.

Output of Selected Commodities

	<u>1966</u>	<u>1967</u>	<u>1968</u>	<u>1969</u>	<u>1970</u>
Pig iron (mn tons)	5.9	6.6	6.8	7.0	7.3
Crude steel (mn tons)	9.9	10.5	11.0	11.3	11.8
Cement (mn tons)	10.0	11.1	11.6	11.8	12.1
Nitrogenous fertilizers ('000 tons N)	462	594	759	938	1,031
Sulphuric acid ('000 tons H ₂ SO ₄)	1,139	1,213	1,315	1,500	1,917
Passenger cars ('000 units)	29.2	27.7	40.4	40.7	67.8
TV sets ('000 units)	413	495	-	600	616.3
Refrigerators ('000 units)	334	341	338	400	443
Cotton fabrics (mn metres)	845	778	840	846	880
Synthetic rubber ('000 tons)	37.4	40.1	40.8	48.1	61.6

Source: Economist Intelligence Unit, Annual Report.

Electricity

Among the nations of Europe, Poland is well endowed with primary energy. Poland's main source of electric power production is hard coal. Hydraulic power in Poland is insignificant.

Poland's production of electricity is increasing each year and in 1970 reached 64 billion kwh.

Following shows Poland's electrical production for the past five years.

Production
(million kwh)

1966	47,388
1967	51,252
1968	55,524
1969	60,060
1970	64,536

Source: United Nations Statistical Bulletin

Consumption of power in Poland by main industrial sectors is as follows: mining 19%, basic metals 23%, manufacture of metal products 9% and chemicals 21%.

Coal is expected to continue to supply Poland's energy requirements for the next decade at which time nuclear power may begin to play a role in Poland's power economy.

Transportation

Poland's transportation facilities have greatly increased during the past 25 years. Substantial outlays have been made in expanding and modernizing the Polish State Railways and also for improving road transportation. Road transport, not very well developed in 1945, is now a major transport service in Poland. In 1970 it accounted for nearly 67% of total freight transport and 56% of passenger transport. Development plans for 1971-1975 foresee a faster development in road transportation than in railway transportation facilities. Pipelines and inland navigation facilities are also to be expanded. All branches of transportation are expected to considerably increase carrying capacities for both freight and passengers.

FOREIGN TRADE

Poland's foreign trade continues to increase each year and during the past decade expanded by some 158% compared to 116% the previous decade. In 1970 Poland's foreign trade amounted to slightly over \$7 billion with imports slightly higher than exports. The estimated 50% gain for the next five years would bring Poland's trade to nearly \$11 billion by 1975.

The following table shows the value of Poland's foreign trade during the past five years. During this period Poland has had a slight trade deficit each year, except for 1968.

	<u>Imports</u>	<u>Exports</u>
	Billions	dollars
1966	2.5	2.3
1967	2.7	2.5
1968	2.9	2.9
1969	3.3	3.2
1970	3.8	3.6

Source: United Nations Monthly Bulletin

Prior to the Second World War Poland traded principally with the countries of Western Europe. The majority of Polish exports at that time consisted of agricultural products and raw materials which accounted for over 84% of total exports. Exports of products of heavy industry accounted for only 1% of Poland's exports. Imports consisted primarily of manufactured products.

After the Second World War Poland's foreign trade changed both in types of commodities and geographical direction.

Expansion of trade with the Communist countries became particularly intensive. As a member of COMECON Poland's trade with this group is expected to continue to be the major portion of her foreign trade. In 1970 the Socialist countries accounted for 66% of Poland's foreign trade with the COMECON countries accounting for 63%. The U.S.S.R. alone accounted for 37.7% of Poland's imports and 35.3% of her exports. The German Democratic Republic and Czechoslovakia were the other major trading partners in this area. Among the non-Socialist countries, the E.E.C. countries accounted for 11% of Poland's trade and the E.F.T.A. countries for 10%, with West Germany and the U.K. the principal trading partners. The U.S. accounted for approximately 2% and Canada less than one-half per cent. Polish trade with the developing countries is expanding at about 9% annually and Poland is making a continuous effort to extend trade with these countries.

Changes in commodity structure have also occurred during the post war period. The following table shows the change in Poland's imports and exports during the past two decades. The share of machinery and equipment and manufactured goods in foreign trade has expanded while that of raw materials and agricultural products has declined during this period.

Imports by Commodity Groupings 1950-1970
Percentage

	<u>1950</u>	<u>1960</u>	<u>1969</u>	<u>1970</u>
Machinery and equipment	32.4	27.1	36.9	36.4
Fuels, raw materials and materials	53.1	51.5	47.0	47.8
Agricultural products and foodstuffs	11.2	16.0	10.4	9.6
Manufactured consumer goods	3.3	5.4	5.7	6.2

Exports by Commodity Groupings 1950-1970
Percentage

	<u>1950</u>	<u>1960</u>	<u>1969</u>	<u>1970</u>
Machinery and equipment	7.8	28.0	39.2	38.5
Fuels, raw materials and materials	56.0	43.8	33.0	32.7
Agricultural products and foodstuffs	24.0	18.1	12.1	13.2
Manufactured consumer goods	12.2	10.1	15.7	15.6

Source: Statistical Yearbook of Poland

Poland's Imports

Poland's imports have increased approximately 147% over the past 10 years. Although decreasing its share of total imports, fuels, raw materials and materials remain the major portion of Poland's imports accounting for 47.8% of total imports in 1970. Poland imports over 80% of its iron-ore requirements and all of the manganese ore and tin needed for its iron and steel industry. The non-ferrous metal industry imports zinc concentrates and a high percentage of its aluminum needs. The petroleum industry imports nearly all its oil requirements. Chemical products make up 8%, building materials and accessories 1% and raw materials of animal and vegetable origin such as wood, paper and cellulose products and textile raw materials, 12% of imports of fuel, raw materials and materials.

Machinery and equipment made up 36.4% of total imports in 1970 of which transport equipment accounted for 7.4% and machinery and equipment for light industry, construction and other industries amounted to 7.3%. This category of imports is expanding at a faster rate than imports generally and is expected to continue to do so.

Manufactured goods accounted for 6.2% of Poland's imports in 1970. Imports of consumer goods are to be expanded significantly over the next five years. The revised Five Year Plan 1971-1975 foresees an expansion of 75%, triple the increase originally planned. This increase could offer some sales prospects for Western exporters.

Following is a list of Poland's major imports:

Imports of Selected Commodities

Commodity	Unit	1950	1955	1960	1965	1969	1970
Lorries	No.	—	.	1440	1951	6583	7582
Passenger cars	thous. No.	—	.	5,8	21,1	12,9	16,5
Coking coal	thous. t	—	—	776	1210	1088	1095
Crude petroleum	thous. t	194	545	714	3216	6510	7011
Petroleum products	thous. t	279	886	1790	2248	2397	2417
Natural gas	mill. cu. ms	77	137	241	379	994	1002
Ores: iron	thous. t	1918	4407	7320	9273	11575	11843
manganese	thous. t	92	335	333	348	394	389
Zinc concentrates	thous. t	56	80	111	146	84	124
Aluminium oxide	thous. t	0,3	50	54	86	196	213
Dead burnt magnesite	thous. t	12	25	56	152	132	205
Pig iron	thous. t	31	13	13	793	1212	1485
Metallurgical products	thous. t	103	146	472	488	1264	1398
Copper	thous. t	14,2	13,4	20,9	29,0	26,3	21,9
Tin	t	1590	1206	1290	2558	3988	3537
Fertilizers	thous. t	972	1293	1530	2770	3859	4408
Rubber: natural	thous. t	5,5	19,1	34,5	38,8	53,6	55,3
synthetic	thous. t	6,1	7,0	14,5	17,6	29,1	33,2
Cellulose	thous. t	44	53	80	130	105	158
Cotton	thous. t	93	95	127	143	132	150
Wool	thous. t	13,0	16,3	18,8	17,3	16,9	17,6
Rayon fibre	t	.	537	3461	4458	9275	7988
Artificial and synthetic fibres	thous. t	12,0	6,5	12,5	22,4	28,8	32,5
Raw hides	thous. t ^a	14,2	30,1	40,8	34,3	35,0	42,1
Feeds	thous. t	3	3	143	323	412	448
Fats, animal and vegetable ^b	thous. t	44	41	81	123	132	120
Wheat	thous. t	236	739	1700	1378	1181	1099
Barley	thous. t	54	11	231	485	375	1093
Maize	thous. t	22	7	46	785	247	231
Rice	thous. t	9	31	100	67	62	60
Oil seeds and fruits	thous. t ^c	6,1	25,4	27,1	48,5	32,0	19,1
Tea, coffee, cocoa beans	thous. t	5,4	7,8	17,9	38,4	59,7	57,1
Meat and meat products	thous. t	3,1	2,0	18,1	39,4	36,2	44,5
Fish and fish products	thous. t	22,4	9,7	31,4	21,0	11,5	14,6
Citrus fruits	thous. t	8,2	9,9	32,3	60,1	96,8	80,4
Knitted goods	mill. zj ^d	—	—	2,2	40,8	51,4	81,4
Footwear with leather tops	th. pair	3008	1050	2237	3770	3101	3131
Wooden furniture	mill. zj ^d	6,2	0,1	1,5	36,2	46,4	63,6
Pharmaceutical products	mill. zj ^d	20,5	16,1	29,2	59,8	88,5	112,6

Source: Statistical Yearbook of Poland 1971.

Poland's Exports

During the past decade Poland's exports increased 169%. Major growth has occurred in the export of machinery and equipment and in manufactured consumer goods.

Machinery and equipment in 1970 accounted for the largest share of Poland's total exports, 38.5% compared to 28% in 1960. Ships and equipment accounted

for the major share in this category, 5.7%. An important role is also played by exports of complete industrial plants for the chemical industry and sugar factories. In 1970 complete plants and equipment accounted for 4.7% of exports of machinery while power and electrical machinery exports were 3.1%. Poland is also an important supplier of railway rolling stock.

Exports of manufactured goods accounted for 15.6% of total exports in 1970 of which textiles and clothing made up 6%. The substantial increase in exports of manufactured consumer goods during the past decade has been to a certain degree achieved at the expense of domestic supplies.

Polish agricultural exports have shifted toward more highly processed products.

According to the revised plan 1971-1975 Poland exports should increase slightly faster than imports averaging 11% annually against 9.7% of last plan. Priority is to be given to increase sales of machinery, investment and industrial equipment and consumer goods.

Following is a list of major exports of Poland:

Exports of Selected Commodities

Commodity	Unit	1950	1955	1960	1965	1969	1970
Metal working machine tools	No.	232	477	1726	3869	6488	5653
Textile machines	mill. z/	1,9	4,0	10,7	59,7	95,5	118,6
Excavators	mill. z/	—	—	16,2	29,7	103,9	144,0
Complete equipment for:							
coal mines	mill. z/	—	1,7	33,6	33,5	30,9	60,0
sugar factories	mill. z/	—	6,9	71,8	103,3	118,5	84,7
Agricultural machines	mill. z/	0,9	3,1	13,7	50,6	108,2	98,9
Goods-vans	No.	4006	2792	3605	5394	5077	4879
Passenger coaches	No.	100	277	794	365	306	295
Lorries	No.	—	789	2188	4753	7622	8040
Passenger cars	No.	—	1538	3379	4972	15702	23660
Ships	thous. DWT	3	93	176	260	421	402
Hard coal	mill. t	26,6	24,1	17,5	21,0	26,4	28,8
Lignite	thous. t	3726	4058	5455	5199	4381	3972
Coke	thous. t	1794	2240	2086	2324	2324	2284
Petroleum products	thous. t	1	151	221	1027	1695	1314
Sulphur	thous. t	—	—	—	241	1450	1772
Metallurgical products	thous. t	20,0	8,2	1,6	1,1	457,0	366,6
Zinc and zinc sheets	thous. t	171	248	707	920	1261	1464
Soda ash and sodium hydroxide	thous. t	67,0	96,4	97,7	97,1	102,9	100,7
Dyes	t	60	52	235	234	223	189
Fertilizers	thous. t	644	1225	1865	4065	6276	6901
Sawn softwood	thous. cu. ms	0,8	4,9	35,5	46,7	326,6	458,1
Seeds	mill. z/	354	409	420	890	710	807
Brewer's barley	thous. t	7,4	9,9	21,1	56,3	67,6	92,1
Meat and meat products	thous. t	6	22	82	57	51	145
Butter	thous. t	80	81	110	197	176,4	156,7
Eggs	mill. No.	1,1	3,9	28,6	18,3	9,3	12,6
Vegetables, potatoes, fruit and berries	mill. z/	411	344	972	751	448	403
Sugar	thous. t	5,2	12,3	45,1	161,8	142,4	202,9
Fabrics:		234	372	316	473	302	306
cotton and cotton-like	mill. ms	74,2	57,5	92,5	139,4	147,9	107,4
wool and wool-like	mill. ms	5,0	5,8	8,4	10,4	6,8	7,0
linen	mill. ms	8,4	3,7	13,4	16,1	17,0	19,7
Clothing and underwear	mill. z/	1,3	3,9	84,5	165,9	327,6	400,1
Footwear with leather tops	thous. pair	—	3	610	4771	10077	13884
Wooden furniture	mill. z/	3,6	3,4	32,4	95,9	143,9	161,3
Pharmaceutical products	mill. z/	0,2	5,8	20,4	104,7	233,6	274,8

CANADIAN TRADE WITH POLAND

Canada's trade with Poland traditionally represents a very minor proportion of Poland's foreign trade and in 1970 Canada's exports to this country represented only .4% of Poland's total imports. In 1970, Canada exported \$15.2 million to Poland and imported \$12 million worth of goods.

Trade statistics between those two countries are shown below for the years 1966-1970. Canada's imports remain fairly stable but exports fluctuate due to erratic sales of wheat and other cereals as well as zinc ore. With the exception of 1969, the balance of trade has been in Canada's favour.

Canada-Poland Trade 1966-1970 (\$'000)

	<u>Canadian Exports to Poland</u>	<u>Canadian Imports from Poland</u>	<u>Balance (+) (-)</u>
1966	37,404	13,757	+ 23,647
1967	25,790	14,982	+ 10,808
1968	18,240	13,351	+ 4,889
1969	6,554	12,408	- 5,854
1970	15,161	12,026	+ 3,135

Source: Statistics Canada

Canadian Exports to Poland

Canadian exports to Poland during the first nine months of 1971 were \$12.2 million compared to \$13.8 million in 1970, while imports amounted to \$10.8 million in 1971 compared to \$8.2 million in 1970 for the corresponding period.

In 1970, Canada's exports to Poland increased 131% over 1969. This increase was due to new sales of barley amounting to \$6.6 million and an increase of \$1.6 million in wheat sales to \$3.9 million. These two items, along with asbestos (\$2.5 million) made up 86.9% of Canada's exports to Poland in 1970. In 1969, wheat and asbestos sales made up 70% of Canada's exports.

For the next few years, while raw materials will continue to be major imports for Poland, imports of consumer goods is expected to expand considerably to meet Poland's increasing domestic demand for a wider variety of better quality products. In this latter sector, opportunities should exist for Canadian exporters, as up till now most of our exports have consisted of basic materials.

Ontario's Exports to Poland

In 1970 Ontario exports to Poland amounted to \$979,500 compared to \$790,000 in 1969. The three major items of Ontario exports in 1970 were rawhides and skins, excluding furs, valued at \$486,700, fine paper valued at \$119,500

and containers and closures \$121,500. These three items accounted for 74% of Ontario's exports to this country.

Canadian Imports from Poland

Canadian imports from Poland in 1970 amounted to \$12 million, approximately the same as in 1969. The majority of imports consists of agricultural products, textiles, and other light industrial products.

Textiles and fabric imports were valued at \$2.9 million and clothing, inner and outer, at \$1.3 million. Other imports of importance included men's boots and shoes (\$431,652), cotton bed sheets (\$654,434), bicycles (\$485,376) fox fur skins (\$276,616) and fruits in liquid preserves not canned (\$306,131).

Opportunities for Canadian Manufacturers

Poland imports between \$3-4 billion of goods a year of which nearly \$1 billion comes from Western countries. Canada's share in this market is very small but it would appear this could be significantly increased in spite of competition from Western European and Japanese manufacturers as well as Poland's preference for purchases from Eastern Europe because of trade agreements and the fact that these eastern transactions do not involve convertible currencies. With patience it should be possible for Canadian exporters to find new markets in addition to their present ones. Canada's sales to Poland over the past few years have consisted mainly of basic items such as wheat, barley, hides, asbestos and molybdenum. There has been little Canadian export of manufactured goods which are important among Poland's imports from other industrial countries. Export opportunities could exist for Canadian manufacturers of such items as chemical apparatus and plants, electronic equipment particularly measuring apparatus and automation and process control equipment, scientific equipment, airport equipment, and production and packaging equipment for the food processing industry and consumer goods industry.

Poland's present Plan's concentration on developing of consumer products will probably entail the rapid re-equipment of the textile, footwear and food processing industries with Western high output machinery. Poland is also planning investment in Western plant and equipment for the chemical and petro-chemical, plastics and machine tools industries. These areas could offer potential sales opportunities for Canadian exporters.

Polish Foreign Trade Policy

Foreign trade in Poland is state controlled. Poland at the beginning of 1971 carried out a limited reorganization of its foreign trade institutions. Formerly, international trade was the sole responsibility of approximately 40 state-owned foreign trade enterprises, each specializing in the import or export of a particular group of products. These organizations were responsible to the Ministry of Foreign trade and negotiated for both the importer and exporter.

Recognizing the need for a more direct linking of foreign trade with industry, changes were instituted by which most of the foreign trade

organizations dealing with manufactured products (but not raw materials) became part of the industrial enterprise whose products they previously exported. Under this new system it is easier for an exporter to Poland to discuss technical and commercial matters directly with the end user.

Poland is a member of G.A.T.T. Poland has a most-favoured nation agreement with Canada.

Polish Economic Planning Policy

Poland's economy progresses through Five Year Plans. The present government which came into power in January 1971, has substantially revised the Plan 1971-1975 and following are some of the goals envisaged by the revised Plan aimed at speeding up social, economic, scientific and technological progress.

The Plan aims at a growth in real wages in the socialized economy of 17-18%. Consumption growth is expected to be about 38% to be accompanied by an increase of 35% in food supplies and a 50% increase of light industry products for the domestic market. National income is expected to grow about 38%-39% over the next five years, compared to 34% during the last plan. Industrial production is planned to grow by 48-50% and farming output by 18-21%. Investment will be approximately 42% more than during the past five years, and will increase particularly in the food industry and the light industries sectors, by 65% and 97% respectively.

The anticipated increase in industrial production includes the following aims:

- increase of man-made fibres by 138%
- increase of steel production by 25%
- growth of copper output from 72,000 tons to 180,000 tons
- supplies of electric engineering products for the domestic market to grow by 82-90%
- production of the textile, clothing, footwear and leather industries to expand by about 40%
- growth of furniture output by 52% to cover domestic and export requirements
- production of paper and cardboard to increase by at least 31%

With regard to agriculture the Plan aims at 50% increase in machinery and equipment supplies. Particular attention is to be paid to the development of meat and milk products.

ONTARIO DOMESTIC EXPORTS TO POLAND
BY COMMODITIES 1969 - 1970

COMMODITIES	VALUE \$'000	
	1969	1970
Materials for Food Preparations	-	69.8
Other Foods	-	6.5
Distilled Alcoholic Beverages	1.4	1.5
Raw Hides and Skins, Exc. Fur Skins	655.8	486.7
Other Crude Non-Metallic Minerals	-	17.9
Furs, Dressed, & Fur Fabricated Material	-	.5
Fine Paper	-	119.5
Converted Paper	-	.3
Cotton Broad Woven Fabrics	-	3.9
Inorganic Bases and Metallic Oxides	-	29.4
Other Organic Chemicals	-	37.8
Plastics and Syn. Rubber, Not Shaped	11.5	19.1
Industrial Chem. Specialties & Explosives	.1	-
Copper and Alloys	2.0	44.1
Mech. Power Transm. Equipment & Bearings	-	.2
Other Special Industry Machinery	-	1.6
Electronic & Related Equipment Components	-	3.5
Air Conditioning and Refrig. Equipment	10.3	-
Electric Lighting and Control Equipment	-	.9
Laundry Equipment, Domestic	-	.3
Measuring, Laboratory, etc. Equipment	-	4.7
Furniture and Fixtures	.4	-
Miscellaneous Apparel	.5	.6
Toiletries, Cleaning Prep., etc.	-	.7
Toys Games, Sport & Recreation Equipment	.4	1.0
Medicinal & Pharmaceutical Products	-	6.8
Miscellaneous End Products	.1	.3
Containers and Closures	107.2	121.5
Special Transactions - Trade	.1	.5
TOTAL FOR POLAND	<u>790.0</u>	<u>979.5</u>

SOURCE: 1. Statistics Canada
2. Ontario Exports by Countries

CANADIAN EXPORTS TO POLAND BY COMMODITIES 1969-1970

CLASS	COUNTRY AND COMMODITY	JANUARY TO DECEMBER 1969		JANUARY TO DECEMBER 1970		CLASS
		QUANTITY	VALUE IN DOLLARS	QUANTITY	VALUE IN DOLLARS	
	POLAND					
6119	PASLEY	CWT		3,619,314	6,642,218	6119
6169	WHEAT, EXCEPT SEED N E S	CWT	835,519	1,433,688	3,936,760	6169
14449	SAUSAGE AND SIMILAR MEAT CASINGS	LB		39,849	69,753	14449
14629	INFANT AND JUNIOR FOODS	LB N		4,389	6,525	14629
17340	WHISKY	P GAL	228		2,254	17340
20110	CATTLE HIDES, FAW	NO	99,555	80,316	711,640	20110
20199	HIDES AND SKINS, RAW N E S				23,220	20199
20289	FUR SKINS, UNDERESSED N E S				374	20289
21101	ALPHA SEED	LB		44,100	18,522	21101
21103	CLOVER SEED, ALSIKE	LB		418,950	62,945	21103
21119	SEEDS FOR SOWING N E S	LB	40			21119
25950	MOLYBDENUM IN ORES, CONC. & SCRAP	CWT	1,391	1,750	345,145	25950
27110	ASBESTOS, CRUD	TON		1	1,510	27110
27120	ASBESTOS MILLED FIBRES, GROUP 3 GR.	TON	836			27120
27130	ASBESTOS MILLED FIBRES, GROUP 4 & 5	TON	14,672	14,296	2,295,284	27130
27140	ASBESTOS SHORTS, GROUP 6-9 GRADES	TON	190	2,139	241,950	27140
27955	NEPHELINE SYENITE	TON		720	17,914	27955
31089	FURS, DRESSED N E S		5,537		6,214	31089
31099	FUR PLATES MATS ETC DRESSED OR DYED		598			31099
34019	WOOD PULP DISSOLVING & SPECIAL ALPHA	CWT		4,400	51,536	34019
35299	FINE PAPER N E S	CWT		8,520	119,492	35299
35970	WALLPAPER, PRINTED	CWT		2	279	35970
37399	BROAD WOVEN FABRICS, COTTON N E S	LB		5,000	3,944	37399
37629	BROAD WOVEN FABRICS, WOOL AND HAIR	LB		51	137	37629
38429	NARROW FABRICS	LB	5,619	400	1,318	38429
38499	COATED, IMPREGNATED FABRICS N E S	LB	502			38499
38999	TEXTILE FABRICATED MATERIALS N E S				4,510	38999
40240	IRON OXIDES, NATURAL OR SYNTHETIC	CWT		2,254	29,366	40240
41449	ORGANIC ACIDS, ANHYDRIDES AND DERIV	CWT		1,400	49,923	41449
42499	PLASTIC & SYN RUBBER NOT SHAPED NES	CWT		954	19,116	42499
42835	READY-MIXED PAINTS, INCL WHITE LEAD	GAL	706	28	133	42835
42929	DYESTUFFS, PIGMENTS, LAKES & TONERS	CWT	1			42929
45208	COPPER BARS, RODS AND SHAPES N E S	CWT		1,101	77,171	45208
45279	COPPER ALLOY SHAPES AND SECTIONS	CWT	20			45279
45945	MAGNESIUM	LB			42,700	45945
50499	POWER TRANSMISSION EQUIP & PTS N E S				206	50499
52349	WELDING APPARATUS, EQUIPMENT & PTS				16,220	52349
52929	CONSTRUCTION MAINTENANCE MACHY & PT				46,079	52929
52979	TEXTILE INDUSTRIES MACHY AND PARTS				164,677	52979
52999	SPECIAL INDUSTRY MACHY & PARTS NES				1,730	52999
54240	PARTS FOR CULTIVATORS AND WEEDERS				200	54240
54999	AGRICULTURAL MACHY AND PARTS N E S		900		400	54999
58999	PARTS & ACCESS. FOR MOTOR VEH. NES				3,715	58999
59017	PLEASURE AND SPORTING CRAFT N E S	NO	2			59017
63419	TELEPHONE APPARATUS EQUIP AND PARTS				302	63419
63984	SEMI-CONDUCTORS AND PARTS				3,456	63984
63998	ELECTRONIC EQUIPMENT COMPONENTS NES				667	63998
65599	AIR CONDITN & REFRIG EQUIP & PT NES			10,291		65599
68019	ELECTRIC LIGHTING FIXTURES & PARTS			18,437	937	68019
68049	SWITCHGEAR & PROTECT EQUIP & PT NES				915	68049
69799	ELECTRICAL EQUIP APPL AND PARTS NES				386	69799
69819	PARTS OF WASHING MACH ELEC DOMESTIC				252	69819
70069	MEDICAL & REL. INSTR EQUIP & PT NES				2,700	70069
70079	LAB. OPTICAL INSTR. EQUIP & PTS NES			68,760	4,500	70079
70099	MEASURING & TESTING EQUIP & PTS NES			451	5,338	70099
74099	FURNITURE AND FIXTURES N E S			409		74099
78317	OUTDOOR JACKETS	NO		83	1,425	78317
78809	FUR GOODS, APPAREL				3,491	78809
78899	MISCELLANEOUS APPAREL N E S				200	78899
80059	PERFUMES, TOILET PREP AND COSMETICS				709	80059
83026	SKATES, ICE	PAIR	8		968	83026
83099	SPORTING RECREATION EQUIP & PTS NES			65	191	83099
84039	CARPETS MATS, SIMIL. FLOOR COVERING				103	84039
86099	HOUSEHOLD & PERSONAL EQUIP & PT NES				456	86099
87019	BIOLOGICAL PRODUCTS FOR HUMANS				562	87019
87099	MEDICINAL & PHARMACEUTICAL PROD NES				6,936	87099
88069	HEARING AIDS ORTHOPAEDIC APPL & PTS				155	88069
89029	NEWSPAPERS, MAGAZINES & PERIODICALS				768	89029
89099	PRINTED MATTER N E S				4,094	89099
94929	SIGNS AND ADVERTISING DISPLAYS NES				328	94929
94949	BUTTONS, NEEDLES PINS NOTIONS & PTS				6,901	94949
94999	MISCELLANEOUS END PRODUCTS N E S				1,065	94999
95045	BOXES & CARTONS, PAPERBOARD & PARTS				73,393	95045
95049	SHIPPING CONTAINERS PAPER & PTS NES			107,187	50,708	95049
95079	SHIPPING CONTAINERS, PLASTIC & PTS			8,467	13,730	95079
95099	CONTAINERS, CLOSURES AND PARTS NES				837	95099
96059	TEXTILE END PRODUCTS N E S				2,862	96059
97075	SHIPMENTS OF LESS THAN \$100.00 EACH				5,544	97075
	COUNTRY TOTAL		6,554,117		15,161,165	

Source: Statistics Canada

CANADIAN IMPORTS FROM POLAND BY COMMODITIES 1969-1970

CLASS	COUNTRY AND COMMODITY	JANUARY TO DECEMBER 1969		JANUARY TO DECEMBER 1970		CLASS
		QUANTITY	VALUE	QUANTITY	VALUE	
			\$		\$	
POLAND						
449	HORSES N E S	NO		10	11,180	449
1703	CORNER BEEF, CANNED	LB N	14,400	6,317		1703
1709	REEF AND VEAL, CANNED N E S	LB N	12,586	4,639	11,870	5,431
1724	HAMS, CANNED	LB N	391,699	271,070	210,953	168,536
1799	MEAT & MEAT PREPARATIONS CANNED NES	LB N	150,647	64,304	92,346	34,072
4427	HERRING, CANNED	CWT N	14	778	11	271
4469	FISH AND FISH PRODUCTS, CANNED NES	CWT N	362	7,530	436	17,392
5149	CHEESE N E S	CWT			22	385
5359	EGGS, DRIED, POWDERED N E S	LB	115,046	90,781	68,228	55,670
5509	HONEY	LB	11,400	4,392	4,315	1,764
6420	BISCUITS & COCKIES, EXC. SODA BISC.	LB	105,189	19,965	326,780	62,028
6920	POTATO STARCH AND POTATO FLOUR	LB	130,700	11,662	45,700	13,169
7278	STRAWBERRIES, FROZEN	LB	633,196	92,961	1,571,152	271,279
7299	FRUITS AND BERRIES, FROZEN N E S	LB	393,709	86,230	304,412	70,259
7369	CURRENTS, DRIED	LB	7,930	1,783		
7612	CHERRIES IN LIQUID PRESER NOT CANND	LB			8,255	1,813
7659	FRUITS IN LIQ PRESER NOT CANNED NES	LB	2,354,266	264,621	2,360,313	306,131
7692	JAMS, JELLIES AND PRESERVES, CANNED	LB	40,842	6,576	28,961	4,478
7899	FRUITS AND PRODUCTS, CANNED N E S	LB	211,145	43,143	374,072	80,102
9865	MUSHROOMS, CANNED	LB	4,500	2,593		
9899	VEGETABLES & VEG JUICES, CANNED NES	LB	125,506	12,695	351,378	39,930
9915	PICKLES PACKAGED FOR RETAIL SALE	LB N	87,470	6,145	32,301	6,314

POLAND LUN

10416	CHOCOLATES, PACKAGED	LB	906	528			10416
10420	CHOCOLATE CONFECTIONERY N E S	LB	7,196	2,684	11,699	3,147	10420
10449	SUGAR CANDY N E S	LB	434,768	60,700	314,411	48,745	10449
10475	SOFT DRINK CONCENTRATES AND SYRUPS	LB			1,680	493	10475
10499	SUGAR PREP. AND CONFECTIONERY N E S	LB	43,366	8,172			10499
11499	SPICES, SPICE HERBS SPICE SEEDS NES	LB	33,046	5,313	11,023	1,847	11499
17220	ALE, LAGER, PORTER AND STOUT	GAL	720	880	463	650	17220
17360	LIQUEURS	P GAL	1,562	13,372	1,505	12,237	17360
17399	DISTILLED BEVERAGES AND SPIRITS NES	P GAL	15,860	107,759	17,765	119,415	17399
20220	FUR SKINS, FOX	NO	17,337	487,392	15,760	276,616	20220
20529	FEATHERS, DOWNS AND QUILLS	LB	2,885	14,412	1,100	6,198	20529
21199	SEEDS FOR SOWING N E S	LB			440	600	21199
21299	OIL SEEDS OIL NUTS OIL KERNELS NES	CWT	1,034	32,078	2,366	81,539	21299
21974	CRUDE HERBS & PLANT PT FOR MEDICINE			3,167		3,308	21974
29119	TEXTILE RAGS N E S	CWT	3,319	9,424	2,151	6,576	29119
33999	WOOD FABRICATED MATERIALS N E S			9,866		26,666	33999
35760	HARD BOARD	CWT	163,595	274,430	49,400	92,772	35760
36405	COTTON THREAD FOR SEWING	LB	12,040	10,590	6,594	8,657	36405
36468	COTTON YARN, PLETED N E S	LB	55,768	66,560	48,958	57,851	36468
37208	WOOLLEN FAB ALL WOOL 9 OZ AND LESS	LB	1,886	5,693	8,546	24,514	37208
37213	WORSTED FABRICS ALL WOOL 12 OZ & OV	LB	194	518			37213
37216	WORSTED FAB ALL WOOL UND 12 OV 9 OZ	LB	1,736	5,357	1,703	4,381	37216
37218	WORSTED FAB ALL WOOL 9 OZ AND LESS	LB	53,468	146,235	82,018	225,640	37218
37302	DUCK AND ALLIED FABRICS, COTTON	LB			814	874	37302
37315	DRILL THILL WARP SATEEN COT BLEACHED	LB	18,343	13,223	14,774	9,171	37315
37318	DRILL THILL WARP SATEEN COT COLORED	LB	133,630	88,922	52,333	34,950	37318
37322	CHEESE BANDAGE TOBACCO CLOTH COTTON	LB	90,502	68,447	27,641	22,991	37322
37335	BRAD CLOTH & LIGHT WT POPLIN COT BL	LB	43,720	34,553	8,307	7,311	37335
37338	BRAD CLOTH & LT WT POPLIN COT COLOR	LB	54,356	48,750	13,983	12,515	37338
37343	PRINT CLOTH & SHEETING COTTON UNBL	LB	8,724	5,399			37343
37345	PRINT CLOTH & SHEETING COT BLEACHED	LB	339,606	248,213	128,114	106,281	37345
37348	PRINT CLOTH & SHEETING COT COLORED	LB	181,215	142,560	110,805	101,308	37348
37354	FLANNEL NAPPED FABRIC COT UNAL & BL	LB	455,475	297,904	692,822	484,984	37354
37356	FLANNEL NAPPED FABRIC COTTON COLOR	LB	459,958	314,729	585,882	376,784	37356
37362	DEVIMS, COTTON	LB	27,522	22,131	6,196	3,883	37362
37366	GINGHAMS, COTTON	LB	31,423	26,975	2,200	3,276	37366
37382	CORDURYS, COTTON, COLOURED	LB	166,788	133,624	262,653	234,417	37382
37389	PILE FABRICS, COTTON N E S	LB	11,044	11,771	33,757	38,279	37389
37395	BRAD WOVEN FABRICS COTTON BL N E S	LB	133,213	99,717	178,050	155,647	37395
37398	BRAD WOVEN FABRICS COT COLORED NES	LB	111,127	85,444	82,315	67,892	37398
37440	LIVEN BRAD WOVEN FABRICS	LB	45,342	28,881	21,908	13,416	37440
37509	PILE FABRICS OF ONE MAN-MADE FIBRE	LB	38,687	37,665	4,088	6,630	37509
37519	RAYON BRAD WOVEN FABRICS	LB	627,956	539,879	517,856	483,175	37519
37539	NYLON BRAD WOVEN FABRICS	LB	15,975	60,817	12,570	43,051	37539
37545	POLYESTER BRAD WOVEN FABRICS	LB			154	317	37545
37599	BRAD WOV FAB. ONE MAN-MD FIBRE NES	LB	4,464	4,067			37599
37739	BRAD WOVEN FAB. WOOL MIXTURES NES	LB			4,153	16,557	37739
37759	PILE FABRICS, MAN-MADE MIXTURES	LB	45,741	39,883	78,643	67,277	37759
37767	RAYON MAN-MD MIX. BRAD WOV FAB NES	LB	3,252	6,508			37767
37769	RAYON MIXTURE BRAD WOVEN FAB. NES	LB	54,100	41,892	73,819	58,791	37769
37789	BRAD WOVEN FAB. MIXED FIBRES N E S	LB	17,455	10,279	33,349	21,208	37789
38159	NETTINGS N E S	LB	1,234	1,931			38159
38359	WOVEN NARROW FABRICS, ELASTIC	LB	754	757			38359
38609	LACE FABRICS	LB			99,654	228,935	38609
38911	HODDS, SHAPES, FUR OR WOOL-FUR FELT	DOZ	2,020	10,824	13,897	75,568	38911
38919	HODDS AND SHAPES, TEXTILE N E S	DOZ	2,490	14,827	99	465	38919
40388	POTASSIUM NITRATE, SALTPETER	CWT	1,872	11,716			40388
40391	NITRITES AND NITRATES N E S	CWT	17,885	61,634	5,948	34,830	40391
40437	CARBONATES AND PERCARBONATES N E S	CWT			110	600	40437
40466	SODIUM BICROMATE	CWT	540	4,810	551	5,763	40466
40813	PHENOLS AND PHENOL-ALCOHOLS N E S	CWT	1,410	29,638			40813
40979	PHTHALATES & PHTHALATE ESTERS NES	CWT	5,139	54,514			40979
40993	ACETYSALICYLIC ACID EXCEPT TABLETS	CWT	224	6,359			40993
41163	HEXAMETHYLENE-TETRAMINE	CWT	9,222	80,888			41163
42119	GLUE, ANIMAL	LB	199,688	21,639	349,480	38,087	42119
42605	ACID DYESTUFFS	LB	81,214	39,013	63,342	24,905	42605
42610	BASIC DYESTUFFS	LB	23,067	20,548			42610
42612	BASIC DYESTUFFS N E S	LB			22,185	18,232	42612
42615	CHROME DYESTUFFS	LB	2,156	956	2,200	1,450	42615
42620	DIRECT AND DEVELOPED DYESTUFFS	LB	31,519	20,132	28,706	14,740	42620
42625	SULPHUR DYESTUFFS	LB	2,200	375	10,956	1,717	42625
42932	DEXTRIN AND DEXTRIN PREPARATIONS	LB	22,046	10,278			42932
42946	GELATIN, INEDIBLE	LB	22,000	5,914			42946
42999	INDUSTRIAL CHEMICAL SPECIALITIES NES	LB	40,092	2,787			42999
44405	CONCRETE REIN. BARS CARBON STEEL HR	CWT	55,598	201,129	13,343	56,619	44405
44450	WIRE RODS, STEEL, HOT ROLLED	CWT	10,471	43,450			44450
44502	PLATES CARB STEEL 60 IN OR LESS NES	CWT	90,509	370,043	29,522	146,008	44502
44503	PLATES CARB STEEL OV 60 TO 100 INL	CWT	34,727	156,503	4,875	27,974	44503
44508	PLATES CARBON STEEL FLOOR PATTERNED	CWT			860	4,788	44508
44531	STRIP, CS, HR, UP TO 12 INCHES NES	CWT	222	817			44531
44533	SHEET CARBON STEEL HR 24-51 IN. NES	CWT	7,113	27,871			44533
44611	CHANNELS, CARBON STEEL, LARGE SIZES	CWT			7,708	40,832	44611
44615	STRUCT SHAPES STEEL LARGE SIZES NES	CWT	7,402	32,676			44615
44618	ANGLES, CS, INTERMEDIATE SIZES	CWT	17,511	64,846	2,119	11,003	44618
44620	STRUCT SHAPE STEEL INTERMEDIATE NES	CWT	6,687	28,814			44620
44630	STRUCT SHAPES STEEL, BAR SIZE N E S	CWT	35,349	137,865			44630
44807	PIPES AND TUBES OF CAST IRON, NEW	CWT	292	2,628			44807
44905	BARBED WIRE	CWT			5,251	45,008	44905
46506	BOLTS & HEADED OR THREADED RODS NES			29,868		17,580	46506

POLAND CON

46508	NUTS, LOCK NUTS AND STOP NUTS N E S		72,398		100,715	46508
46514	CAP SCREWS		139,392		134,579	46514
46516	MACHINE SCREWS		5,756		765	46516
46532	WIRE NAILS, STEEL, 1 INCH OR MORE	LB	1,404,050		98,397	46532
46538	CUT NAILS, EXCEPT RAIL SPIKES	LB	25,122			46538
46599	BASIC HARDWARE N E S				181	46599
47303	WINDOW GLASS NOT OVER 34 OZ/SQ. FT.	SQ FT	1,477,912	70,357	35,255	47303
47306	WINDOW GLASS OVER 34OZ/SQ. FT.	SQ FT	293,343	27,457	3,026	47306
47318	WIRED GLASS IN SHEETS OR PLATES	SQ FT	51,465	4,161	2,950	47318
47327	COLOURED GLASS, ORNAMENTAL ETC NES	SQ FT	8,232	794		47327
47330	WHITE GLASS, CHIPPED OR ENAMELLED	SQ FT	142,103	10,913	17,063	47330
47362	GLASS ARTICLES TO BE CUT, MOUNTED			1,316	5,156	47362
50401	BEARINGS & PARTS FOR MOTOR VEHICLES				17,494	50401
50895	PUMPS AND PARTS N E S				5,239	50895
52302	DRILLING MACHY, METALWORKING & PTS	NO			12,873	52302
52303	METAL BORING DRILLING MACHY & PARTS	NO	4	19,708		52303
52305	METAL GRINDING MACHINES AND PARTS	NO			8,979	52305
52307	LATHES, METALWORKING, TURRET N E S	NO	3	13,515	2	52307
52308	LATHES, METALWORKING, AND PARTS NES	NO	32	131,458	12	52308
52309	METAL MILLING MACHINES AND PARTS	NO	5	64,048	4	52309
52329	MACHINE TOOLS METALWORKING & PT NES			4,597	10,934	52329
52377	JIGS FIXTURES & METALWORKING ACCESS			6,455		52377
52386	DRILLS TAPS BITS METALWRK MACHY NES			32,690	29,127	52386
52396	CUTTING TOOLS FOR METALWRK MACH NES			9,042	18,965	52396
52706	CARD CLOTHING FOR TEXTILE MACHINERY				363	52706
52799	TEXTILE INDUSTRIES MACHY & PTS NES				239	52799
59169	PLEASURE AND SPORTING CRAFT N E S	NO	401	8,232	2,600	59169
61108	BICYCLES	NO	29,103	427,603	31,430	61108
61116	BICYCLE SADDLES	NO			260	61116
61120	PARTS AND ACCESS. FOR BICYCLES NES			4,956	7,331	61120
62109	TRUCK AND BUS TIRES, PNEUMATIC, NEW	NO			6	62109
62115	TRACTOR & IMPLEMENT TIRES PNEU. NEW	NO			50	62115
62129	TIRES, BICYCLE MOTORCYCLE PNEU. NEW	NO	18,100	7,607	4,300	62129
62525	TIRE TUBES FOR BICYCLES MOTORCYCLES	NO	500	146	2,700	62525
63790	PHONOGRAPH RECORDS AND BLANKS	NO	5,538	5,762	9,920	63790
63816	ELECTRONIC RECEIVING TUBES	NO			4,000	63816
63915	RESISTORS, ELECTRONIC, AND PARTS			296		63915
68191	GLUBES REFLECTOR ETC FOR LIGHT FIXT			114,912		68191
68199	ELECTRIC LIGHTING FIXT & PARTS NES				117,007	68199
69348	DRY CELL FLASHLIGHT BATTERIES	NO	12,000	277	5,928	69348
69719	FOOD PREP APPLIANCES ELEC & PTS NES			498		69719
69899	LAUNDRY EQUIPMENT DOMESTIC & PT NES			900	900	69899
70204	AMMETERS VOLTMETERS OHMMETERS & PTS	NO	48	828		70204
70217	ELEC. PROPERTY MEASURING INSTR & PT			12,743	35,555	70217
70290	ELEC. MEASURING & TESTING INSTR NES			1,106		70290
70710	OPTICAL MICROSCOPES & PTS EXC LENS	NO	1,002	64,304	575	70710
70919	NAVIGATION INSTRUMENTS APPAR & PTS				406	70919
70991	SURVEYING TRANSITS, THEODOLITES	NO	1	291		70991
70997	MODELS FOR DEMONSTRATION ETC. & PTS				911	70997
74012	FURNITURE, WOODEN, HOLID, NOT UPHOL			105,219	128,642	74012
74032	FURNITURE, CAMP, LAWN AND VERANDA			18,144	5,523	74032
74039	FURNITURE, SPECIAL PURPOSE N E S			1,873		74039
74072	MATTRESSES	NO	1,570	4,403	7,200	74072
75204	FILES AND RASPS	DOZ	100	511		75204
75252	AXES AND HATCHETS	DOZ			41	75252
75256	AUGERS, BITS, FRACES, HAND DRILLS			33,102		75256
75408	MECHANICS GAUGES			17,803	10,085	75408
75449	MECHANICS MEASURING TOOLS & PTS NES			20,299	29,470	75449
75532	ANVILS, VISES AND PARTS			24,270	11,935	75532
75589	HAND TOOLS AND PARTS N E S			1,056	6,801	75589
75595	CHESTS, KITS AND SETS OF HAND TOOLS			25,540	42,728	75595
75865	SCISSORS, SHEARS AND TRIMMERS	NO	11,520	3,148	2,353	75865
75899	CUTLERY N E S			900	1,179	75899
76113	BROOMS AND WHISKS	DOZ	50,875	219,857	42,701	76113
76149	BRUSHES N E S, AND MOPS			267	2,082	76149
76389	NON-ELEC CLEANING EQUIP & PARTS NES			5,084		76389
76119	UNDERWEAR MADE FROM WOVEN FABRICS	NO	12,000	1,313		76119
78149	UNDERWEAR N E S	NO	244,244	43,364	254,712	78149
78192	PYJAMAS, SLEEPWEAR	NO	34,812	38,377		78192
78199	SLEEPWEAR N E S	NO	12,000	13,466		78199
78309	BATHROBES DRESSING GOWNS HOUSECOATS	NO	26,300	66,979	38,448	78309
78317	OUTDOOR JACKETS	NO	40,882	180,936	40,259	78317
78318	OVERCOATS AND TOPCOATS	NO	5,542	32,113		78318
78320	OVERCOATS AND TOPCOATS MENS & BOYS	NO			7,937	78320
78321	OVERCOATS & TOPCOATS WOMENS & GIRLS	NO			12,202	78321
78325	DRESSES, EXCEPT KNITTED N E S	NO			756	78325
78328	SPORTS COATS AND BLAZERS	NO	660	1,306		78328
78331	OVERALLS	NO	6,000	2,906	12,000	78331
78333	PANTS, MENS AND BOYS, COTTON	NO	137,395	197,228	169,880	78333
78335	PANTS, MENS AND BOYS N E S	NO			2,476	78335
78341	SHIRTS, COTTON, EXCEPT KNITTED	NO	185,572	122,753	211,104	78341
78347	SHIRTS, EXCEPT KNITTED N E S	NO			8,424	78347
78351	SHORTS, OUTERWEAR, EXCEPT KNITTED	NO			72,540	78351
78352	PANTS SLACKS WOMENS CHILDS EXC KNIT	NO	3,525	7,622	8,125	78352
78369	SUITS, FINE SLACK & SPORT, EXC KNIT	NO	434	6,519	2,900	78369
78399	OUTERWEAR, EXCEPT KNITTED N E S	NO	200	1,358	7,133	78399
78404	BATHING SUITS, KNITTED	NO	21,600	10,354	98,880	78404
78465	SUITS AND DRESSES, KNITTED	NO	2,448	3,672		78465
78470	SWEATERS CARDG KNT WOOL MENS BOYS	NO	19,476	42,711	2,376	78470

POLAND CON

78475	SWEATERS KNIT. MAN-MD FIBRE MEN BOY	NO	49,824	61,298			78475
78476	SWEATERS KNIT MAN-MD FIB WOMEN GIRL	NO	1,290	1,357			78476
78479	SWEATERS & CAROISANS, KNITTED N E S	NO	97,819	63,253	30,000	18,642	78479
78482	T-SHIRTS, KNITTED, COTTON	NO	220,392	86,530	143,352	40,163	78482
78485	SHIRTS, SWEATSHIRTS, KNIT. COT. NES	NO	318,888	160,896	104,364	51,394	78485
78489	SHIRTS & SWEATSHIRTS, KNITTED N E S	NO	61,896	32,313	70,956	52,396	78489
78499	OUTERWEAR, KNITTED N E S	NO	33,112	35,547	21,791	28,363	78499
78649	HEADWEAR N E S	DOZ	4,074	24,040			78649
78674	GLOVES AND MITTENS, MAN-MADE FIBRE	DZ PR	500	4,289			78674
78680	GLOVES AND MITTENS, LEATHER	DZ PR	280	6,342	3,084	71,931	78680
78809	FUR GOODS, APPAREL	NO	39	1,665			78809
78952	WOMENS HANDBAGS AND PURSES	DOZ	18	641	204	9,156	78952
78999	APPAREL ACCESSORIES N E S			279			78999
79012	BOOTS & SHOES MENS & BOYS LAST-MADE	PAIR	211,429	499,511	213,062	431,652	79012
79014	BOOTS SHOES WOMEN & GIRLS LAST-MADE	PAIR	14,940	34,059	34,902	69,206	79014
79040	WATERPROOF RUBBER FOOTWEAR	PAIR	106,772	125,254	73,942	83,526	79040
83237	SKIS	PAIR	3,787	58,154	1,181	27,568	83237
83262	BALLS FOR SPORTS AND GAMES N E S			5,845		6,786	83262
83289	SPORTING RECREATION EQUIP & PTS NES			8,080		18,313	83289
83709	GAMES AND ENTERTAINMENT EQUIP N E S			11,685		1,997	83709
83711	DOLLS			3,370		184	83711
83716	STUFFED ANIMALS			7,130		1,946	83716
83720	CONSTRUCTION TOYS AND PARTS			3,367		4,088	83720
83789	TOYS AND PARTS N E S			64,407		79,772	83789
84499	CARPETS, RUGS, MATS AND RUNNERS NES			4,267		9,114	84499
84501	CURTAINS, COTTON	LB			1,570	1,640	84501
84503	CURTAINS, MAN-MADE TEXTILE FIBRE	LB			3,592	10,105	84503
84510	DRAPERIES & TAPESTRIES EXCEPT RUGS	LB	153,839	47,708	78,610	26,128	84510
84601	BEDSPREADS, TEXTILE	NO	146,742	237,194	106,990	200,444	84601
84633	BLANKETS OF COTTON	NO	193,273	128,411	118,940	80,489	84633
84639	BLANKETS N E S	NO	1,000	2,005	39,000	35,871	84639
84643	SHEETS, BED, COTTON	NO			709,930	654,434	84643
84645	SHEETS, BED, N E S EXCEPT RUBBER	NO	346,472	326,356	7,600	10,948	84645
84650	PILLOW CASES, TEXTILE	NO	292,075	67,699			84650
84653	PILLOW CASES, COTTON	NO					84653
84699	BEDDING, TEXTILE N E S				514,944	113,134	84699
84711	TABLECLOTHS	LB	207,249	171,830	266,731	205,817	84711
84715	TABLE YAPKINS, TEXTILE	LB	14,906	16,285	11,457	11,426	84715
84728	TABLE SETS	LB	3,146	2,984			84728
84803	TOWELS, COTTON, TERRY	LB	9,339	6,893	90,068	67,425	84803
84805	TOWELS, COTTON N E S	LB			6,091	4,837	84805
84807	TOWELS, LINEN	LB	113,766	83,459	139,490	99,892	84807
84839	WASHCLOTHS, BATH MATS AND SETS	LB	13,928	11,845	17,971	15,743	84839
84909	FURNITURE COVERS, TEXTILE			9,725		37,134	84909
84916	CUSHION COVERS, TEXTILE					858	84916
85013	COOK. UTENSILS VITREOUS ENAMEL & PT			17,498		23,133	85013
85019	COOKING UTENSILS AND PARTS N E S					664	85019
85039	FOOD PREP. AND STORAGE UTENSILS NES			966			85039
85044	FOOD CHOPPERS, CUTTERS, HAND & PTS					1,880	85044
85049	KITCHEN TOOLS & HAND APPL & PTS NES			1,080		411	85049
85052	TABLE KNIVES FORKS SPOONS STAINLESS	DOZ	3,352	4,789	20,080	51,418	85052
85059	KITCHEN AND TABLE CUTLERY N E S			11,636			85059
85062	TABLEWARE, CERAMIC			146,325		164,495	85062
85063	TUMBLER & STEMMARE GLASS OR CRYSTAL			96,494		122,782	85063
85064	TABLEWARE, GLASS N E S			170,678		142,911	85064
85069	TABLEWARE N E S					1,789	85069
86209	SEWING MACHINES, DOMESTIC	NO			600	11,139	86209
86499	LUGGAGE N E S			13,825		15,619	86499
86608	MATCHES EXCEPT BOOK MATCHES			6,008		7,306	86608
86640	SMOKERS ACCESSORIES N E S			13,643		18,498	86640
86712	TRAYS			2,492		374	86712
86716	HHOLD BASKETS BOXES CANS & BAGS NES			165,461		143,709	86716
86724	FIREPLACE FIXTURES, EQUIPMENT & PTS					4,339	86724
86730	ART AND DECORATIVE WARE, GLASS			75,343		104,467	86730
86732	ART AND DECORATIVE WARE N E S			201		2,612	86732
86739	WARDROBE ACCESSORIES, BAGS, COVERS					1,156	86739
86799	HOUSEHOLD & PERSONAL EQUIP & PT NES			12,198		3,445	86799
89341	BOOKS AND PAMPHLETS NES EXC ENGLISH			5,099		5,072	89341
89589	ADVERTISING MATTER PRINTED N E S					1,431	89589
90489	DESK ACCESS. & OFFICE DEVICES & PTS			632			90489
91564	SENSITIZED PHOTOCOPY, BLU.PRT PAPER			415			91564
91569	SENSITIZED PHOTO PAPER & CLOTH NES			692			91569
91813	MOTION PICTURE FILM, SOLD, EXPOSED	FT	31,456	2,825	36,168	2,848	91813
91939	CAMERA AND PROJECTION LENSES					285	91939
92165	STRINGED INSTRUMENTS AND PARTS NES	NO			1,620	4,387	92165
93016	FIREARMS, NON-MILITARY NES & PARTS	NO		317			93016
93019	AMMUNITION, NON-MILITARY USE & PTS			43,292			93019
93021	SHOTSHELLS						93021
93029	AMMUNITION N E S, NON-MILITARY					56,296	93029
94499	SEWING ACCESSORIES AND NOTIONS NES			30,582		47,267	94499
94608	PAINTINGS AND PASTELS, MADE BY HAND	NO	113	6,750	4	668	94608
94640	COLLECTIONS & COLLECTORS ITEMS NES			1,641			94640
94954	XMAS TREE DECORATIONS EXCEPT LIGHTS			196,124		186,717	94954
94966	NON-ELEC LIGHTING FIXTURES & PT NES			11,271		10,843	94966
94999	MISCELLANEOUS END PRODUCTS N E S			392			94999
95036	SHIPPING CONTAINERS GLASS & PTS NES			240		3,160	95036
95055	BARRELS AND KEGS, WOODEN	NO	66	366			95055
95066	SHIPPING CONTAINERS WOODEN & PT NES					4,311	95066
96154	MOTOR AND STEAMER RUGS, LAP RUGS	NO	7,570	19,857	4,790	12,550	96154

POLAND CON

96156	TENTS	NO	350	4,250	1,870	32,499	96156
96159	TEXTILE END PRODUCTS N E S			1,146		10,462	95159
97010	IMPORT PACKING, RE-USABLE NOT DESCR			43,200		45,847	97010
97030	GOODS RETURNED WITHIN FIVE YEARS			500			97030
97075	SHIPMENTS OF LESS THAN \$200.00 EACH			88,942		84,543	97075
				12,407,909		12,025,788	

Source: Statistics Canada

